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SERIES ON SHANGHAI CULTURAL DEVELOPMENT

上海文化产业发展报告 (2018)

促进新消费，激发新动能

主编 / 荣跃明

执行主编 / 花建

ANNUAL REPORT ON CULTURAL INDUSTRY DEVELOPMENT OF SHANGHAI (2018)

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摘 要

习近平总书记在十九大报告中指出：中国特色社会主义进入到新的时代。我国社会主要矛盾已经转化成为人民日益增长的美好生活需求和发展不平衡不充分之间的矛盾。在文化产业领域也存在着文化消费与文化生产之间不平衡、不同门类的产业竞争力不平衡、文化投入和文化产出效益不平衡、文化贸易结构不平衡等一系列突出问题，这也是中国文化产业提升效益和规模的重大机遇。中国文化产业应该在推动新消费方面做出更大的贡献。其重点是坚持创新驱动，释放文化产业的新动能；推动文化科技融合，开发文化消费新业态；适应各类社会群体的不同需求，生产文化消费新产品。

本书“总报告”以“新消费、新动能”为主题，对上海和全国文化产业的发展做了深入的研究，指出 2016 年全国文化产业增加值达到 30 254 亿元，占 GDP 比重达到 4.07%，是近 10 年来的最高值。但是，在中国文化产业领域也存在着文化消费与文化生产之间不平衡、不同门类的产业竞争力不平衡、文化投入和文化产出的效益不平衡、文化产业对外贸易结构不平衡等一系列问题。这就要求中国文化产业在投资、结构、规模、效率等方面有一个新的跨越。中国政府大力推动的新消费包括三大特点：第一，中国人民的消费重点，正从追求数量的满足向注重质量的提升、从追求有形物质产品的消费向注重更多的服务消费、从追求温饱型生活向追求幸福和谐生活转变；第二，中国的消费市场，正在形成以传统消费转型升级、新兴消费引领发展为主要内容的新消费，数字内容、智能设备、信息服务等新兴消费正在渗透到工业装备、科技创新、基础设施和公共服务等领域，给文化产业提供了具有巨大发展潜力的新空间；第三，中国的消费能量，包括文化消费需求，正在越来越强劲地影响世界消费市场。这些新消费的实现需要上海和全国的文化产业做出巨大贡献，也将吸引

更多的投资和资源。根据联合国贸发会议最新颁布的《世界投资报告(2017)》,数字经济已经成为全球经济发展的新动能。上海在建设有全球影响力的科创中心背景下,在推动金融、经济、贸易和航运中心与国际文化大都市的进程中,正在大力发展文化产业的新技术、新模式,在数字出版、数字游戏、视频服务、互联网广播、新型视听等新兴业态建设方面走在全国前列,在网络化、多样化、数字化的文化产业领域,释放出强大的新动能。

本书栏目之一“激发新动能:推动文化科技融合”,对上海的文化科技融合创新能力进行了深入的分析,指出文化产业科技创新能力是由创新行为主体、内部核心要素以及外部生态环境要素协同创新所形成的推动文化产业技术创新、业态创新、内容创新、产品创新与模式创新的能力,具有整体性、开放新、协同性、动态性等特征。上海(0.81)与北京(1.20)、深圳(0.92)相比,文化产业科技创新能力综合指数居于后进;上海在VR/AR和人工智能等新技术与文化产业的结合方面,也受到了北京、广东等省市的强烈挑战。有鉴于此,在“互联网+”与上海建设具有全球影响力的科技创新中心的大好契机下,上海应加大文化产业研发投入力度,完善文化产业科技创新政策,紧跟前沿科技动向,积极发展文化科技装备等新兴产业基地,鼓励与培植产业创新力,培育龙头科技型文化企业。

本栏目之二“培育新要素:释放文化产业活力”,对上海文化产业积极培育的新要素进行多角度的探索,指出上海文化产业要在质量、效益和规模上有新的跨越,要大力培育新要素,优化产业生态。比如:上海国际艺术节积极推动扶持青年艺术家计划,吸引了海内外的优秀青年艺术家集聚上海,成为上海文化产业源源不断的新资源;众包、众筹等日渐成熟的分享经济模式,为文化企业的开放式创新提供了线上载体,上海正在利用这种“大众驱动创新”的形式,充分发掘大众的智慧与创意,引导更多的用户参与文化产业链的价值创造;作为国际文化大都市的文化产业生态,上海不仅需要政产学研的组合,也需要非政府社会组织的贡献。一批文化产业的社会智库、行业协会、服务平台等,正在文化产业生态中显示各自的独特功能。

本栏目之三“鼓励新消费:提高投资开发效率”,结合当前国内社会消费

结构进入升级阶段的新形势,研究了上海正在培育和鼓励的一系列文化产业新消费项目。比如,从2005年开始创办的中国国际动漫游戏博览会(CCG EXPO)顺应动漫游戏产业向广泛互联互通方向发展的国际趋势,从针对少年儿童的“小儿科”稳步迈向辐射广泛消费领域的“大产业,”坚持市场化、国际化、专业化、品牌化的发展战略,树立了全力打造“亚洲第一、全球一流”的发展目标;上海以对外开放和文化合作的开阔胸怀,推动上海迪士尼乐园和上海国际旅游度假区的建设,“迪士尼红利”正在逐步显示,将带动整个长三角城市群产业结构升级和发展方式转变,推动了旅游业、文化产业等上百个产业,也会带动一批新型服务经济兴起。

本栏目之四“培育新业态:推动产业的升级”,分析了上海近期风起云涌的文化产业新业态。如上海的会展产业更提出打造高端会展峰会,凸显国际会展之都实力;培育优秀会展企业,夯实国际会展之都基础;打造新型会展业态等一系列举措。在目前世界会展城市实力排行榜上,根据展馆面积、展会项目和组展商营业额三大维度,上海综合排名位居全球会展城市第三,仅次于巴黎和法兰克福。而在“互联网+”时代,数字出版、网络电台、视频直播等正在成为上海文化产业的新亮点。上海的“互联网+音乐产业”不再追求单一依靠实体市场的运行方式,而是充分利用互联网信息技术的成本低、互动性强、传播率高的优势,在网络信息平台开展音乐内容的传播与营销,推动上海音乐产业在“互联网+”时代迈向新的转型。

Abstract

In the report of the 19th CPC National Congress, General Secretary Xi Jinping said that Socialism with Chinese characteristics has entered a new era. The principal contradiction facing Chinese society has evolved into one “between unbalanced and inadequate development and the people’s ever-growing needs for a better life”. Such outstanding problems also exist in the field of cultural industry, including the imbalance between cultural consumption and cultural production, between industries of different categories, between cultural inputs and outputs, and between cultural trade structures. However, these problems are also regarded as great opportunities for improving the benefits and scale of China’s cultural industry, which is expected to make a greater contribution to promote new consumption. The emphasis lies in insisting on innovation driven, and releasing new motivation on cultural industry; promoting the integration of culture and science and technology, and creating a new form of cultural consumption; catering to various needs of different social groups, and developing new cultural consumption products.

Titled as “New Consumption, New Motivation”, the General Report conducts a deep study on the development of cultural industry in Shanghai and nationwide. It points out that the value added of national cultural industry in 2016 has reached up to RMB 3 025.4 billion yuan, accounting for 4.07% of GDP, which has been the peak in the last 10 years. However, a series of problems also exist in the field of cultural industry, such as the imbalance between cultural consumption and cultural production, between industries of different categories, between cultural inputs and outputs, and between cultural trade structures. It is demanded for a new leap

forward in the aspects of investment, structure, scale, efficiency in cultural industry. The new consumption that the Chinese government has vigorously promoted includes three major features:

The first one lies in the focus of Chinese people's consumption, which are transforming from the pursuit of quantity satisfaction to quality improvement, from the pursuit of tangible products consumption to more service consumption, and from the pursuit of food and clothing to an overall better-off life.

The second one lies in China's consumer market. New consumption is being formed which is characterized by the transformation and upgrading of traditional consumption, and the leading function of emerging consumption. Digital contents, intelligent devices, and information services are infiltrating into the fields of industrial equipment, science and technology innovation, infrastructures and public services, providing new space with great development potential for cultural industry.

The third one lies in China's consumption energy, including cultural consumption demands which have increasingly stronger impact on global consumer market. The realization of new consumption depends on the outstanding contribution of Shanghai's and national cultural industry, and will attract more investment and resources. According to the latest publication of the World Investment Report (2017) by the United Nations Conference on Trade and Development, digital economy has become the new motivation for global economic development. Under the background of constructing a science and technology innovation center with global influence, Shanghai is rapidly developing new technology and new mode of cultural industry in the process of establishing the financial, economic, trade and shipping centers and building the International Cultural Metropolis. The construction of digital publishing, digital games, video services, internet broadcasting, new audio-visual and other emerging formats in Shanghai are in the forefront of the whole nation and have released great motivation in the networked, diversified and digitized cultural industry field.

With the topic of “Stimulating New Motivation; Promoting the Integration of Culture and Science and Technology”, Section I makes an in-depth analysis on the ability of innovation and integration of culture and science and technology in Shanghai. It points out that scientific and technological innovation ability of cultural industry has three core elements, including the main body of creative behavior, internal core elements, and external ecological environment elements. The collaborative innovation of the three elements promotes technology innovation, format innovation, content innovation, production innovation and mode innovation in cultural industry with the characteristics of entirety, openness, coordination and dynamics. Shanghai(0.81), compared with Beijing(1.20) and Shenzhen(0.92), ranks lower in the comprehensive index of scientific and technological innovation ability of cultural industry. Shanghai has also been strongly challenged by provinces and cities such as Beijing and Guangdong in the aspect of the combination between new technologies such as VR/AR and artificial intelligence and cultural industry. In light of this, under the great opportunity of the “Internet +” era and the background of constructing a science and technology innovation center with global influence, Shanghai should increase the R & D investment of cultural industry, perfecting the policy of scientific and technological innovation in cultural industry. Shanghai also needs to follow up the trend of frontier science and technology, and actively develop new industrial bases, such as cultural, scientific and technological equipment. Moreover, Shanghai have to make great efforts to develop industrial innovation power, and cultivate leading scientific and technological culture enterprises.

Section II is titled as “Cultivating New Elements: Releasing the Vitality of Cultural Industry”, providing a multi-angle exploration for new elements cultivated by Shanghai’s cultural industry. It states that Shanghai’s cultural industry needs a new leap in quality, efficiency and scale, developing new elements and optimizing the industrial ecology. For example, Shanghai International Art Festival actively

promotes the project to support young artists, attracting the outstanding ones from home and abroad to gather in Shanghai, which has become new endless resources for Shanghai's cultural industry. Increasingly-developed sharing economic model, such as crowd-sourcing and crowd-funding, supplies an online carrier to the open innovation of cultural enterprises. Shanghai is utilizing this form of "public driven innovation" to fully inspire the wisdom and creativity of the public and guide more users to participate in the value creation of cultural industry chain. As an international cultural metropolis, Shanghai cultural industry ecology not only needs government-industry-university-research cooperation, but also needs the contribution from non-governmental organizations. A group of social think tanks, industry associations and service platforms in cultural industry field, are presenting their own unique functions in the cultural industry ecology.

Section III is titled as "Encouraging New Consumption: Improving the efficiency of investment and development". Combined with the new situation that current domestic social consumption structure is experiencing the upgrading stage, it studies a series of new cultural industry consumption projects in Shanghai which are being nurtured and encouraged. For example, China International Cartoon& Game EXPO(CCG EXPO), which started in 2005, conforms to the international trend in which the cartoon and game industry is developing to the direction of extensive interconnection and inter communication. Its focus has been steadily shifted from children to a "Big Industry" which involves a wider range of consumption. The EXPO insists the strategy of marketization, internationalization, specialization and branding and sets up the development goal of "the best in Asia and the first-class in the world". Shanghai promotes the construction of Shanghai Disneyland and Shanghai International Tourist Resort with the open mind of cultural cooperation. Benefitted from the "Disney Bonus", the up grading of industrial structure and the transformation of development mode will be accelerated, hundreds of industries will be improved, and a number of new service economies will rise.

Themed as “Cultivating New Format: Promoting Industrial Upgrading”, Section IV analyzes the new format of cultural industry in Shanghai. For example, Shanghai MICE industry aims to hold high-end conferences and manifest the strength as a metropolitan of convention and conference. Meanwhile, it cultivates advanced MICE enterprises, and solidifies the foundation of such a metropolitan. It also proposes and implements a series of new MICE formats. On the current list of the MICE strength of world cities, according to the quantity of exhibition area, exhibition projects and exhibitors’ turnover, Shanghai ranked the third, second only to Paris and Frankfurt. In the “Internet+” Era, digital publishing, internet radio and video live broadcast are becoming the new highlights of Shanghai’s cultural industry. The “Internet + Music Industry” in Shanghai no longer pursues the operation merely relying on physical markets, but takes full advantage of the internet information technology with the characteristics of low cost, strong interaction and high spread efficiency. It carries out the dissemination and marketing of music content on the internet information platform, and promotes new transformation of Shanghai Music Industry in this new era.

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